487

Information
Guide

Credit for the Elderly or for the Permanently and Totally Disabled

To help us complete the examination of your return, please include the following with your records.

1. Total amount of disability income payments you received during the tax year.

2. Amount of your contribution, if any, to the cost of your disability pension.

3. The mandatory retirement age required by your employer – the age at which you would have been required to retire under your employer's retirement program, had you not become disabled. *(If unknown to you, please ask your employer.)*

4. The date you retired.

5. Total amounts of any nontaxable pensions, annuities or disability income you received.

6. If you are claiming the credit based on total disability, a statement from a qualified physician certifying that you were permanently and totally disabled on the date of your retirement.

For Privacy Act and Paperwork Reduction Act Notice, see enclosed Notice 609.

Department
of the
Treasury
Internal
Revenue
Service

Notice 487
(Rev. 7-88)

T 22.63:

READEX FICHE best copy available